Creating a Requisition
1. To create a requisition for a company that does not have a catalog in PelliBiz, click on the Requisition Form button under the Shop bar.
2. Enter the vendor’s name in the Enter Supplier field or use the supplier search to view the available vendors.
3. In the Supplier Search box, use a partial of the vendor name, the full name, or the Banner P number in the Supplier Name field.
4. Click Search.
5. To browse the full list of available vendors, leave the search field empty and click Search.
6. Click Select next to the appropriate vendor name. To change a vendor’s fulfillment address, see the additional training.
7. Enter the Product Description, Catalog No. (if applicable), Quantity, Price, and Unit of Measurement.

8. Select the correct Commodity Code using the magnifying glass icon. Commodity Codes are universal, 3 digit codes associated with each item/service being purchased.
9. Click Save and Add Another to enter additional items using the same process.
10. Notice the Recently added items shows the items that have already been entered.
11. After all of the items are entered, click Save and Close.
12. Click on the cart link to access the active cart.
13. Click the View My Cart button to view the cart page.
14. Or click the Checkout button to bypass the cart page to complete the additional requisition information and add any attachment.
15. Once the cart is open:
   A. Shoppers- click the Assign Cart button because they cannot enter Accounting Codes
   B. Requestors- Click Proceed to Checkout
16. Shoppers- the Assign Cart To field might have a default person. To change the user, click Select from profile values or Search for an assignee. Note: All full time employees have PelliBiz accounts.
17. Use the space provided to add a note to the Assignee. Do not put any note or comments in the product descriptions.
18. Click Assign.
19. This is the last step for Shoppers. Notice the information provided on the Shopping Cart Information page, particularly the requisition number.

20. Requestors will have to complete the following steps for any carts that have been assigned to them in addition to any carts they create.
21. Requestors—After clicking Proceed to Checkout, notice the task bar at the top of the page. Boxes with green checkmarks do not require action while boxes with the caution icon do.  
22. Click the edit button to complete the Shipping Address.
23. Enter Shipping/Receiving in the space provided. Unless the order is a membership, subscription, or service, do not add an individual’s name.

24. Click Save.
25. On the Accounting Codes page, click the edit button to open the Accounting Codes box.
26. Click Select from profile values under Index.
27. Select the appropriate Index (department) Code. Notice the Fund, Organization, and Program auto-populate.
28. Click Select from all values under Account to search for the correct account code.
29. Use the Value field if searching by a number (ex. 74515) or the Description field if searching by a word or phrase (ex. Office Supplies). Part numbers or descriptions may be used.

30. Click Search. Leave the fields empty and click Search to view the complete list of codes.
31. Click Select next to the correct code.
32. Click Save to close the Accounting Codes box.
33. Click on the Internal Notes & Attachments box in the task bar to add additional information.
34. To add a note to the requisition, click the edit button.
35. Enter any comments pertaining to the requisition at this point- not in the product description because it will print on the Purchase Order.
36. Click Save.
37. To add an attachment, click the add attachment button. Be sure to attach all quotes and other pertinent information.
38. Click the Browse button to select from any documents save to the computer or any external drives.

39. After adding all attachments, click Save.
40. The Attachments and Comments tab will show the number of attachments with this requisition, when applicable.
41. Once the task bar has all green checkmarks, click Submit Requisition.
42. The Requisition Information Page will appear with important information including: the Requisition Number, Quick View for a printable view of the order, and the Approvals tab.
43. Click on the Approvals Tab.
44. The Approvals Tab shows the process of approvals the requisition must follow before it will be created as a Purchase Order. Active will appear in the box where the requisition currently sits.
45. Click on the view approvers button.
46. This box shows those who must approve the requisition on this step. Note their contact information has been conveniently provided if there are any questions.

47. Click Close.
48. Click on the History tab. This shows everything that has happened to this requisition.

NOTE: Shoppers can access the PR Approvals tab and the History tab once the requisition has been submitted by their Requestor.